

ACQUISITION PROJECTS

RCO MANUAL #3

For all acquisitions in the following programs
available in 2010:

ALEA, LWCF, WWRP

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What is an acquisition project?

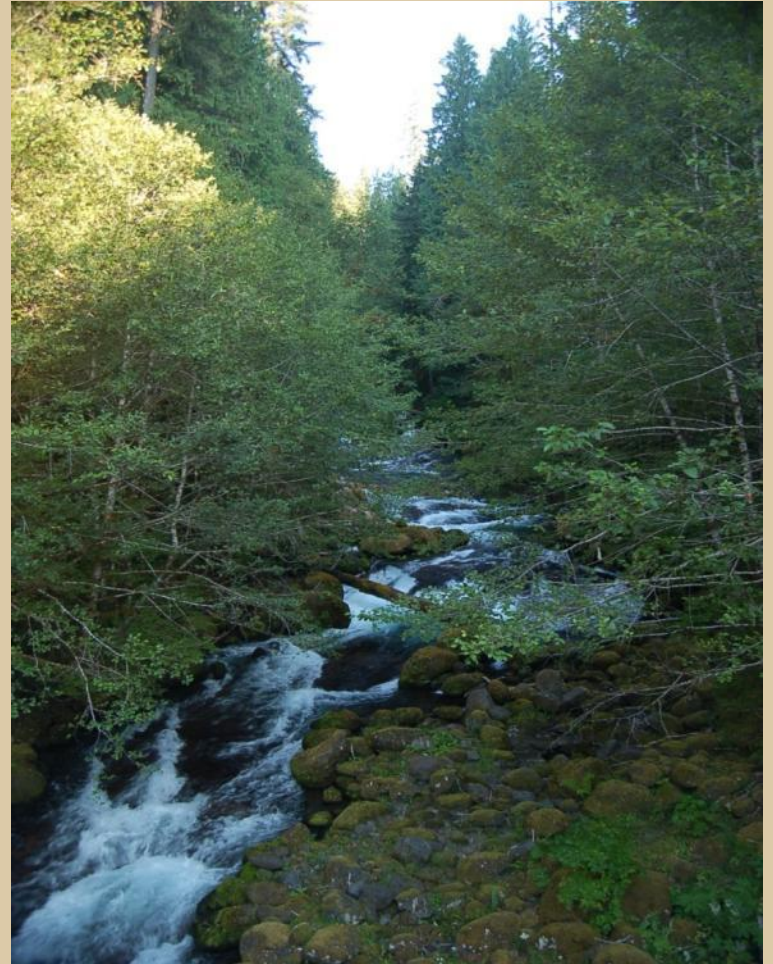
- Purchase of real property rights
- Fee or less than fee interests

Perpetual Interests

- Fee simple
- Easements

Term Interests

- Leases
- Term Easements
- Minimum term varies by grant program
- Cannot be revocable at will
- Cost must be lump sum payment up front



Eligible Properties/Projects

Public Access

- Parks
- Trails
- Waterfront
- Tidelands

Restricted Access

- Farmland
- Highly sensitive habitat
- Must disclose in application

Single or multi-parcel

Specify parcel(s) in your application

Refer to grant program manuals for details



Ineligible Properties

- Already owned by the Sponsor
- Established recreation or habitat areas owned or managed by a public entity
- For unrelated mitigation
- To be used for professional activities
- To be used for indoor facilities, with the following exceptions:
 - Swimming pools and ice rinks (LWCF)
 - Compatible support structures (restrooms, storage, cabins, caretaker's residence – varies by program)

[2007 Manual #3, pg 4]

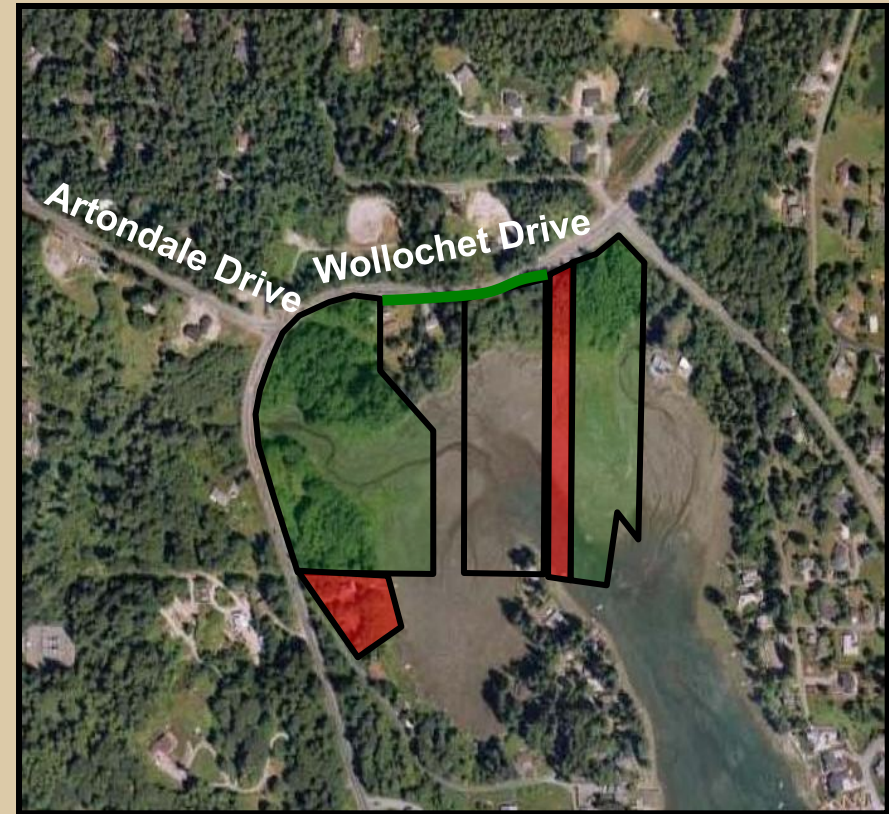
Eligible Costs

- Pre-Agreement
- Administrative (max 5% of total acquisition cost)
- Property
- Incidental
- Improvements – if a compatible support structure; otherwise should be scheduled for demolition

Structures

- Review grant program policy manuals for eligibility details

LWCF – limited list of eligible costs



Existing Park

Addition

[2007 Manual #3, pgs 5-7]

Expenditures & Match

- Cash
- Other grants
- Donations
- Donated land value
- Expenditures and match must all be eligible, within project scope & in accordance with policy



What if I need to acquire the property now?

- Imminent threat of development
- Seller/donor can't wait

Waiver of Retroactivity

- Preserves opportunity for grant funding for next 2 grant cycles
- No guarantee of funding
- Allows acquisition of land prior to grant agreement or even an application
- Must request waiver in advance of closing
- Use standard checklist, memo, property information and questionnaire
- Section Manager approval

[2007 Manual #3, pg 7 & Appendix I]

Property to be immediately available for the purpose of the grant...but if needed:

Allowable Interim Land Uses

- Second Party Use
 - Pre-existing, continuing use
 - Minimal impact to public use
 - Phase out within 3 years
- Life Estates
 - Does not totally limit public use of site
 - Impact is addressed in the valuation (appraisal)
- Requires written approval from RCO
- Disclose in application and at evaluation

Procedures

- Uniform Real Property Acquisition – required for most sponsors
 - Willing Seller
 - Appraisal and Review
 - Offer to purchase at estimated just compensation (based on review value)
 - Secure Option to Purchase or Acquire property
 - Relocation if necessary



[2007 Manual #3, pgs 11-12]

Procedures – continued

- Appraisal & Review – required for all sponsors
 - Required for acquisitions \$10,000 and greater
 - Federal programs (ex: LWCF) use UASFLA, aka Yellow Book
 - All other programs use USPAP
 - Shelf life of 12 months (state-funded grant programs may extend to 18 months with review appraiser certification)
 - The review appraisal establishes fair market value
- USPAP – a few exceptions
 - List & justify Extraordinary Assumptions & Hypothetical Conditions
 - USPAP must be Self-Contained or Summary Format (Restricted format not allowed)
- Share Manual #3 with your Appraiser

[2007 Manual #3, pgs 15-19]

Procedures – continued

- Encumbrances
 - Property must be free of encumbrances that limit intended use
 - Appraisals must include consideration of existing encumbrances
 - Do your best to clear title where possible



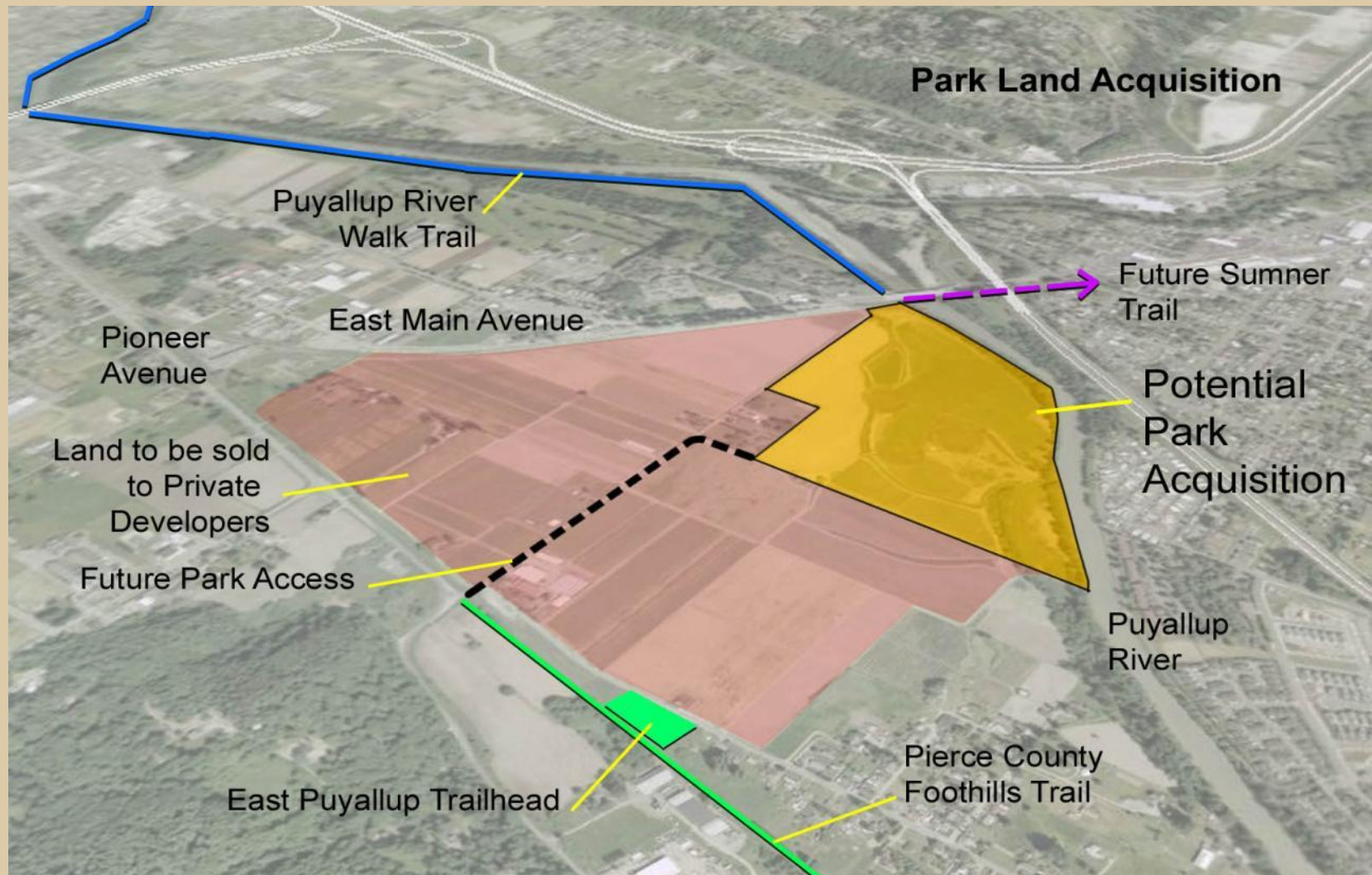
[2007 Manual #3, pg 11]

Procedures – continued

- Donations – documentation required that owner:
 - Was aware of estimated just compensation
 - Was offered the estimated just compensation
 - Made the choice voluntarily
- Escrow Payments
 - Grants typically on reimbursement basis, however:
 - Payments into escrow (advance) by RCO are allowable
 - Request must include copies of several documents
 - Submit request at least 3 weeks before closing
 - RCO funds must be paid out of escrow within 10 days

[2007 Manual #3, pg 14]

Acquisition Projects



Combination Projects

Acquisition and...

- Development, restoration
- Eligible projects vary by program – consult manuals

Timing – at least one month before board approval:

- Acquire under Waiver of Retroactivity
- Have property in escrow
- Obtain option on property
- Provide copies to grant manager

Timing – within 90 days after board approval:

- Exercise option
- Acquire property

Multi-Site Strategy – Some habitat projects

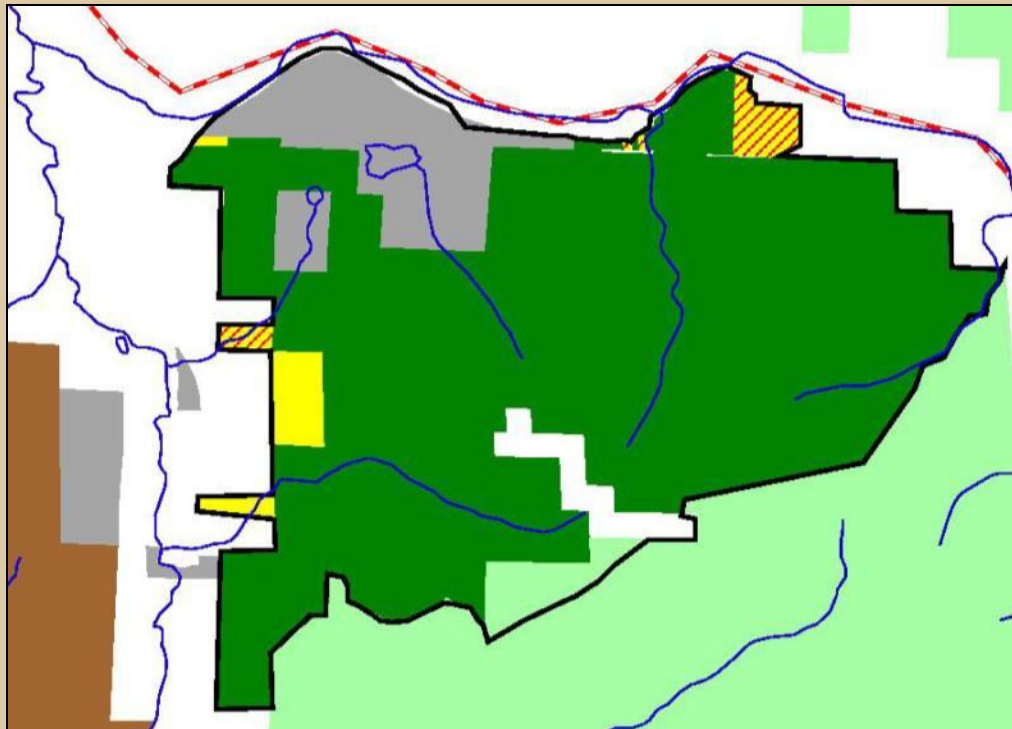
Requires written strategy identifying how parcels were prioritized:

- Ecological significance
- Threat
- Access
- Site management
- Landowner needs

Strategy will be shared with RCO staff and evaluators
– could lead to recommendation to split projects or special conditions to ensure adequate conservation targets are reached

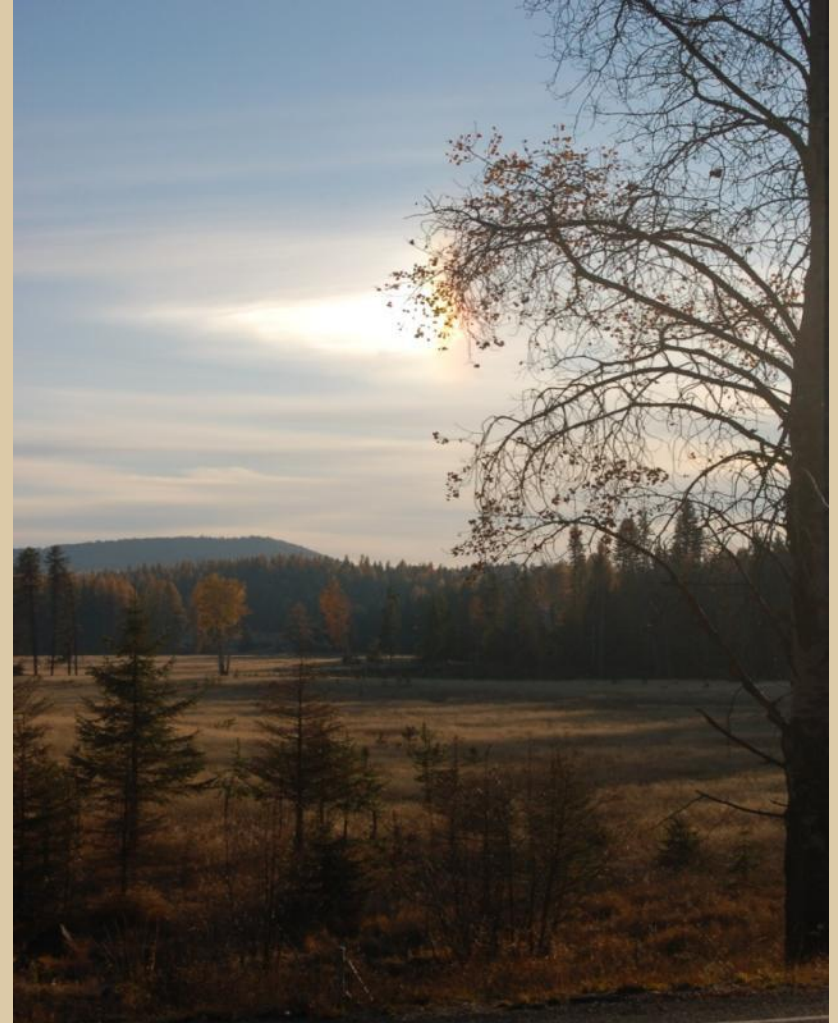
Mapping Targeted Parcels or Geographic Envelope

- Show existing ownership
- Show potential parcels to acquire



Cultural resources

- RCO is lead unless state or federal agency applicant, or on federal land
- May be required to perform Cultural or Historic Resources Survey
- This is an eligible cost (reimbursement) item



Long Term Protection

Deed of Right

- Required for all property acquired in fee
- Conveys property interests to the public forever
- Recorded at closing

Assignment of Rights – for Conservation Easements

- Required for most conservation easements
- Secures the public interest
- Executed and recorded after sponsor takes title to the property

Conversions

- Must find and acquire replacement property

[2007 Manual #3, pgs 3-4]

Documents required to avoid conversion:

Fee Acquisitions

- Deed of Right required for all property acquired in fee
 - Conveys property interests to the public forever
 - Recorded at closing

Less than fee acquisitions

- Habitat Conservation easements – Assignment of Rights Required
 - Executed and recorded after sponsor takes title to the property
- Agricultural Conservation easements – RCO is Third Party
 - Language within easement
- Recreation easements – Trail for example

[2007 Manual #3, pgs 3-4]

- Application wizard
- Three levels of PRISM
- Categories, work types and cost estimates *New!*
- Project metrics *New!*
- If funded, this becomes the basis for grant limits and scope of work for the Project Agreement.

PRISM 2007 (TEST) - [Project Browse]

File Action Screen Reports Window Help

Search Browse Application Progress Report Checklist Org/Person Schedule Summary Agreement Billing Status Inspections

Getting Started with PRISM **Start a New Application**

Project Selection Criteria

1. Fill in selection criteria and press Enter or click "Refresh".

Proj#	Type	Sponsor	Project	Agency	Board - Section	Pro
09-1452						

Projects Meeting Criteria

2. Click row to select project; click toolbar button.

Proj#	Type	Sponsor	Project	Agency	Board - Section	Pro
09-1452	Acq_Rst	Columbia Land Trust	Klickitat RM 13 Floodplain Habitat Acquisition	RCO	SRFB	SAL-PROJ

Total Projects: 1

☐ Project Type Filter ☐ St

09-1452	AR	Columbia Land Trust	Klickitat RM 13 Floodplain Habitat Acquisition	Salmon State Projects	BarbM	Al
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PRISM 2007 (TEST) - [Application Data - Project# 10-1127]

File Action Screen Reports Window Help

Application Progress Report Checklist Org/Person Schedule Summary Agreement Billing Status Inspections Narrative Admin Console

Project #10-1127, Lucienne PRISM Example New Metrics

Worksite Description **Work Types** Cost Estimates Metrics App Questions

Select one or more Work Types that apply to this project. Scroll down to see full list.

Navigate

Click below to navigate screens

Project: Lucienne PRISM Example New Metrics (#10-1127)

Worksite: Example Salmon Site (#1)

Property: Phish Test Property

Add Worksite Add Property

Instructions

Work Types

This tab shows all of the Categories and Work Types that are valid for the Program and Project type for which you are applying.

By checking the appropriate checkbox(es), select the Work Types that are included in your project.

Instream Habitat	<input type="checkbox"/> Water Flow Gauges <input type="checkbox"/> Beavers <input type="checkbox"/> Channel Reconfiguration And Connectivity <input type="checkbox"/> Channel Structure Placement <input type="checkbox"/> Plant Removal/Control <input type="checkbox"/> Spawning Gravel Placement <input type="checkbox"/> Streambank Stabilization	<p>irrigation canals and ditches; regulating flow on previously unregulated diversions; or, replacing canals with pipes to reduce water loss to evaporation.</p> <p>Water gauges installed to measure water use</p> <p>Projects that increase or improve the physical conditions within the stream environment (below the ordinary high water mark of stream) to support increased salmonid population. If Yes, complete C.4. a through C.4. h.</p> <p>The introduction or management of beavers to add natural stream complexity (beaver dams, ponds, etc).</p> <p>Changes in channel morphology, sinuosity or connectivity to off-channel habitat, wetlands or floodplains. This includes instream pools added/created; meanders added; former channel bed restored; or, creation of off-channel habitat consisting of side channels, backwater areas, alcove oxbows, ponds, or side-pools.</p> <p>Placement of large woody debris, rocks/boulders (including deflectors, bars, weirs) to collect and retain gravel for spawning habitat; deepen existing resting/jumping pools; create new pools above and/or below the structure; trap sediment; aerate the water; channel roughening; or, promote deposition of organic debris</p> <p>The removal or control of aquatic non-native plants, invasive species or noxious weeds growing stream channel.</p> <p>Addition of spawning gravel to the stream.</p> <p>The stabilization of the streambank through resloping and/or placement of rocks, logs, or other on streambank.</p>
Pre-restoration Acquisitions and Nursery Operations	<input type="checkbox"/> Nursery Operation <input type="checkbox"/> Restoration Materials	<p>Projects that purchase restoration structures (e.g. logs) or equipment (e.g. bulldozers) for future habitat restoration projects (i.e. projects have not yet been designed, planned or proposed); or projects that fund a nursery operation for vegetation that will be multiple or unspecified restoration projects.</p> <p>Were plants raised to be used for planting in future and ongoing restoration projects?</p> <p>Were structures, equipment or materials purchased?</p>
Riparian Habitat	<input type="checkbox"/> Conservation Grazing Management <input type="checkbox"/> Fencing <input type="checkbox"/> Forestry Practices / Stand Management <input type="checkbox"/> Livestock Exclusion <input checked="" type="checkbox"/> Plant Removal / Control <input checked="" type="checkbox"/> Planting <input type="checkbox"/> Water Gap Development	<p>Projects that change areas (above the ordinary high water mark of the stream and within the flood plain of streams) in order to the environmental conditions necessary to sustain salmonids throughout their life cycle. [If Yes, complete C.5.a through C.5.i.]</p> <p>Alteration of agricultural land use practices to reduce grazing pressure for conservation (e.g., no livestock grazing to minimize impact on riparian areas)</p> <p>Creation of livestock exclusion or other riparian fencing.</p> <p>Treating or managing trees and undergrowth in riparian area including prescribed burnings, stand thinning, stand conversions, and silviculture.</p> <p>Removal of livestock from riparian areas by means other than fencing.</p> <p>Removal and/or control (treatment) of non-native species, noxious weeds and other plants or in species that adversely affect the riparian zone or water table.</p> <p>Riparian planting or native plant establishment.</p> <p>Installing a fenced livestock stream crossing.</p>
Site Maintenance		<p>Projects that maintain the functionality of habitat restoration projects. This includes maintenance of the restoration project site including irrigating or replanting trees that failed to survive.</p>

10-1127 AR Columbia Land Trust Lucienne PRISM Example New Metrics Salmon State Projects Preapplication Guyot

PRISM 2007 (TEST) - [Application Data - Project# 10-1127]

File Action Screen Reports Window Help

Progress Report Checklist Org/Person Schedule Summary Agreement Billing Status Inspections Narrative Admin Console

Project #10-1127, Lucienne PRISM Example New Metrics

Worksite Description Work Types **Cost Estimates** Metrics App Questions

Navigate

Click below to navigate screens

Project: Lucienne PRISM Example New Metrics (#10...)

Worksite: Example Salmon Site (#1)

Property: Phish Test Property

Add Worksite Add Property

Instructions

This tab requests all your non-acquisition costs for this worksite. The costs should include both the costs for which you are seeking funding and the costs you will provide as part of your match.

Selected Categories and Work Types

This list shows the Categories and Work Types that were selected on the previous screen.

Cost Estimate

Cost Item - Using the drop-down box, select the cost items that are applicable to the worksite.

Total Cost - Provide the cost of the cost items selected.

Description - This field is optional. Use the description field to provide additional information about the cost items that you have selected.

State and Local Sales Tax - If applicable, enter the estimated state and local sales tax.

Architectural and Engineering (A&E) Cost Estimate - If

Restoration Cost Estimate

Select cost items, enter costs for each. Descriptions are optional.

Cost Item	Total Cost	Description
Planting	\$750.00	Labor and purchase of native plants
General signs	\$1,000.00	Enamel signs
Cultural resources historical documentation	\$600.00	Staff hours
...		

\$2,350.00

Item Cost Subtotal	\$2,350.00	
State and Local Sales Tax	\$100.00	% 4.26
Subtotal	\$2,450.00	
A&E Cost Estimate	\$365.00	% 14.90
Total Restoration Estimate	\$2,815.00	

PRISM 2007 (TEST) - [Application Data - Project# 10-1127]

File Action Screen Reports Window Help

Progress Report Checklist Org/Person Schedule Summary Agreement Billing Status Inspections Narrative Admin Console

Project #10-1127, Lucienne PRISM Example New Metrics

Worksite Description Work Types Cost Estimates **Metrics** App Questions

Navigate

Click below to navigate screens

Project: Lucienne PRISM Example New Metrics (#10-1127)

Worksite: Example Salmon Site (#1)

Property: Phish Test Property

Add Worksite Add Property

Instructions

Worksite Metrics

Enter your answer to each metric. You may not leave any field blank. Zero may be a valid answer to some of the metrics that you will be asked.

You must select at least one answer for metrics that provide multiple choices (example: Yes/No).

Restoration Metrics

Use the Work Type tab to change the selected Work Types. Each Work Type has its own list of metrics.

Collapse All

☒ Show Descriptions

Estimated

Category: Riparian Habitat (Metrics: 3 filled)

Riparian Habitat Funding: Dollars (PCSRF, State and Other Dollars) allocated/spent on riparian habitat projects. (7 digits) (rounded to nearest dollar) \$4,480

Total Riparian Area Treated: Number of miles (to nearest 0.01 miles) of streambank. 3.00

Total Riparian Area Treated: Number of acres (to nearest 0.1 acre). 1,920.0

Work Type: Planting (Metrics: 2 filled)

Species Of Plants.: Species (scientific) name(s) of plants, text field. Mahonia aquifolium; Symphoricarpos albus;

Acres Planted.: Number of acres (to nearest 0.1 acre) planted. 2.0

Work Type: Plant Removal/Control (Metrics: 2 filled)

Species of Plants Treated/Removed.: Species (scientific) name(s) of plants Rubus armeniacus; Oytisus scoparius; Ranunculus

Acres Treated.: Number of acres (to nearest 0.1 acre) treated. 1.5

Category: General restoration activities

Work Type: Restoration signs (Metrics: 1 filled)

Number of signs installed: 2

Category: Cultural Resources

Work Type: Cultural Resources (Metrics: 1 filled)

Acres surveyed for cultural resources: 3.00

NOAA Fisheries requires these metrics for projects it funds.

Enter Note View/Edit Note

10-1127 AR Columbia Land Trust Lucienne PRISM Example New Metrics Salmon State Projects Preapplication Guyot TEST 1.0.3

PRISM 2007 (TEST) - [Application Data - Project# 10-1127]

File Action Screen Reports Window Help

Application Progress Report Checklist Org/Person Schedule Summary Agreement Billing Status Inspections Narrative Admin Console

Project #10-1127, Lucienne PRISM Example New Metrics

Property Description | Cost Estimates | **Metrics** | App Questions

Navigate

Click below to navigate screens

Project: Lucienne PRISM Example New Metrics (#10-1127)
Worksite: Example Salmon Site (#1)
Property: Phish Test Property

Add Worksite Add Property

Instructions

Property Metrics

Enter your answer to each metric. You may not leave any field blank. Zero may be a valid answer to some of the metrics that you will be asked.

You must select at least one answer for metrics that provide multiple choices (example: Yes/No).

Property Metrics

Property metrics are required for each Cost Item selected on the Costs tab.

Collapse All

Show Descriptions

Estimated

Category: Real Property Acquisition

Work Type: Land (Metrics: 4 filled)

For fee acquisitions, select the Acreage Type and enter the number of acres to be acquired for each type.:

Choice	Acres
<input checked="" type="checkbox"/> Riparian	
<input type="checkbox"/> Lake	
<input type="checkbox"/> Tidelands	
<input type="checkbox"/> Upland	

Identify the Appraised value of any improvements on the property.:

\$98,000

Mitigation for hazardous substances required.: Is mitigation for hazardous substances included in the land acquisition cost for this project?

☒ Yes
☐ No

Encumbrances that limit proposed uses of the project site.: Select one or more of the following to identify any encumbrances that would limit the proposed uses of the project site.

☒ No encumbrances
☐ Covenants
☐ Lease back
☐ Life estate
☐ Restrictions by other funding source
☐ Reversionary clause
☐ Sharecropping

Category: Incidentals

Work Type: Noxious Weed Control (Metrics: 2 filled)

Enter the number of acres treated for noxious weeds.:

2.00

Select the treatment method to be used.:

☒ Mechanical
☐ Chemical

Work Type: Cultural Resources(Acq) (Metrics: 1 filled)

Will there be future impacts to cultural resources.:

No

NOAA Fisheries requires these metrics for projects it funds.

Enter Note View/Edit Note

10-1127 AR Columbia Land Trust Lucienne PRISM Example New Metrics Salmon State Projects Preapplication Guyot TEST 1.0.349

More information available online:

www.rco.wa.gov

- Acquiring Land (Manual #3)
- Grant Program Manuals for ALEA, LWCF, WWRP
- RCO Grant Manager Assignment Map

Critical dates to remember:

- Pre-application Due – March 15, 2010
- Applications Due – May 3, 2010

Questions?

